Open Enrollment 2007

Employee Quick Step Job Aid
Open Enrollment Self Service

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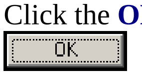
For Assistance with Open Enrollment Call the SPD Benefits Hotline: 317-232-1167 (local) or 1-877-248-0007 (toll free)

The following options are available to all employees during the Open Enrollment Period:
Option #1: Password Reset/IOT Helpdesk - Receive assistance from the IOT Helpdesk with password resets and technical issues.
Option #2: AS-47 - Employees having difficulty printing their AS-47 may receive assistance by pressing option #2. Listen to the recorded message or stay on the line to speak with a SPD Benefits Specialist.
Option #3: General Benefits Questions - Receive enrollment assistance from the SPD Benefits Division.
Option #4: One Care Street - Receive information on how to complete the One Care Street survey and reduce your bi-weekly premium.

Logging Into PeopleSoft for Open Enrollment

1.	Double-click on the Internet Explorer icon on the desktop to open the Internet.
2.	When the Internet window opens, highlight the address field. 
3.	Enter the PeopleSoft URL into the address field. Type:
4.	Click the **OK** button. 
5.	Enter your user id into the **User ID** field. Enter a valid value, e.g. "**S228331**".
6.	Press **[Tab]**.
7.	Enter your password into the **Password** field. Enter a valid value, e.g. "**TODAY1**".
8.	Click the **Sign In** button. 
9.	Congratulations, you have successfully logged into PeopleSoft! You may be prompted to change your password if you have not logged into PeopleSoft within the past 6 months. Please see the **Changing Your Password** section in this manual for further assistance. **End of Procedure.**

Changing Your Password for Open Enrollment

1.	Click the **Click here to change your password** link. Click here to change your password.
2.	Click in the **Current Password** field and type your current password.
3.	Click in the **New Password** field and type your new password. Remember: Passwords should be typed using all capital letters. When creating your new password, be sure to use 6 characters (the new password must contain one number). ••••••
4.	Click in the **Confirm Password** field and type your new password again. Click the **Change Password** button. ••••••
5.	Click the **OK** button. OK
6.	Clicking the OK button will return you to the **Home Page**. If for any reason you are not returned to the Home Page, click the **Home** link. Home
7.	Congratulations! You have successfully changed your password. **End of Procedure.**

Accessing Self-Service

1.	Click the **Current Event Enrollment Summary** link. Current Enrollment Summary
2.	Click the **Home** link to return to the Home Page and begin the election transaction. Home
3.	Click the **Confirm Personal Information** button. Confirm Personal Information
4.	Continue to the **Update Personal Information** section of this manual. **End of Procedure.**

Verifying Personal Information

1.	Review your Home and/or Mailing address. Click the **Change home/mailing addresses** button to make changes. Change home/mailing addresses
2.	Use the **Edit** button to update an existing address, or click the **Add** button to insert a new address (such as an additional mailing address). Click the **Return to Personal Information** link to return to the personal information summary. Return to Personal Information
3.	Once your correct address is confirmed, click the **My Addresses are correct** button. My addresses are correct
4.	Notice that the button has grayed out and the text now displays that your address has been confirmed.
5.	Review your telephone numbers on file. Click the **Change phone numbers** button to add, change or remove a telephone number. Change phone numbers
6.	To make changes to a number, click in the **Telephone** field and highlight the existing phone number. 317/448-8221
7.	Type the new number into the **Telephone** field. Enter a valid value e.g. "**317-555-6565**". To Delete a telephone number, click the **Delete** button next to the number you'd like to remove. To Add a new number, click the **Add a Phone Number** button.
8.	Click the **Save** button. Save
9.	Click the **OK** button. OK
10.	Click the **Return to Personal Information** link. Return to Personal Information
11.	Once your correct phone numbers are confirmed, click the **My Phone Numbers are correct** button. My phone numbers are correct
12.	Review your emergency contact information. Click the **Change emergency contacts** button to add or change emergency contact information. Change email addresses
13.	Click the **Add an Emergency Contact** button to add a new contact person. Add an Emergency Contact

14.	Click in the ***Contact Name** field.
15.	Enter the person's name into the ***Contact Name** field. Enter a valid value e.g. "**Mama Test**".
16.	Click the ***Relationship to Employee** list. Other
17.	Select the appropriate relationship value. Parents
18.	If the emergency contact person lives at the same address, click the **Contact has the same address as the employee** option. If not, click the **Edit Address** link to enter the contact person's address. Contact has the same address as the employee
19.	If the emergency contact person has the same telephone number as you, click the **Contact has the same telephone number as the employee** option. If not, enter the contact person's telephone numbers in the field below.
20.	Scroll to view the rest of the page.
21.	Click the **Save** button. Save
22.	Click the **OK** button. OK
23.	Click the 'Add an Emergency Contact' button to add another point of contact. When finished addition your contact information, click the **Return to Personal Information** link to confirm your entries. Return to Personal Information
24.	Click the **My Emergency Contacts are correct** button. My emergency contacts are correct
25.	Review your email address. To add or change an email address, click the **Change email addresses** button. **Future employee communications may be sent via email. If you are not assigned a state email account, please enter a personal email address.** Change email addresses
26.	To add an email address, click the **Add an Email Address** button. Add an Email Address
27.	Click the ***Email Type** list.
28.	Select the appropriate email type from the list. Business
29.	Enter your email address into the ***Email Address** field. Enter a valid value e.g. "**ttest@agency.in.gov**".
30.	Click the 'Add an Email Address' button to add another email (if desired). When finished, click the **Save** button. Save

31.	Click the **OK** button. OK
32.	Click the **Return to Personal Information** link. Return to Personal Information
33.	Once your email address is confirmed, click the **My email addresses are correct** button.
34.	Scroll to the bottom of the page.
35.	When you have confirmed your address, phone numbers, emergency contacts, and email addresses, click the **Return to Event Selection** link to make your plan selections and complete the enrollment process. Return to Event Selection
36.	**End of Procedure.**

Enroll in a Health Plan

1.	You may now proceed to **Enter Benefit Elections** after you have confirmed your Personal Information. Click the **Enter Benefit Elections** button. Enter Benefit Elections
2.	Click the **Select** button. Select
3.	Click the **Edit** button next to Medical. Edit
4.	**Decision:** Please make a selection from the options listed below. • Review Plan Descriptions (Optional) • View Cost/Rate Information (Optional) • Select a Health Plan
5.	**Review Plan Descriptions (Optional)** Click the **Plan Descriptions** link. Plan Descriptions
6.	Click the **OK** button. OK
7.	Click the **Maximize/Restore** button.
8.	Click the **Close** button.
9.	Click the **Return to Enrollment** link. Return to Enrollment

10.	**View Cost/Rate Information (Optional)** Click the **Costs** link. Costs
11.	Scroll to view the rest of the rates/costs table. Note: Rates shown in this example are for plan year 2004. Plan Year 2005 rates/costs will correctly display when employees access their record.
12.	Click the **Return** link. Return
13.	Scroll until you see the plan in which you would like to enroll. **Note: Employees electing one of the HDHP plans will need to also enroll in the HSA** (see Enroll in HSA section of the manual).
14.	Click the radio button next to the plan name to enroll in the desired plan.
15.	Review the dependents listed. Previously enrolled dependents will appear in the list. You know your dependent is enrolled in the plan when the Enroll check box is marked.
16.	**Decision:** Please make a selection from the options listed below. • Add a New Dependent (Optional) • Specify a Provider
17.	**Add a New Dependent** Click the **Add/Review Dependents** button. Add/Review Dependents
18.	Click the **Add a dependent or beneficiary** link. Add a dependent or beneficiary
19.	Enter the desired information into the **First Name** field. Enter a valid value e.g. "**Francis**".
20.	Enter the desired information into the **Middle Name** field. Enter a valid value e.g. "**A**".
21.	Enter the desired information into the **Last Name** field. Enter a valid value e.g. "**Irish**".
22.	Click the ***Gender** list.
23.	Click on the appropriate gender in the list. Male
24.	Click in the **Birthdate** field.
25.	Enter the desired information into the **Birthdate** field. Enter a valid value e.g. "**051286**".
26.	Click in the **SSN** field.
27.	Enter the desired information into the **SSN** field. Enter a valid value e.g. "**321778561**".
28.	Click the ***Relationship to Employee** list.

29.	Click an entry in the list. e.g. click step-son. Step-Son
30.	Scroll down to view the remainder of the page.
31.	Click the **Same Address as Employee** option. Same Address as Employee
32.	Click in the **Phone** field.
33.	Enter the desired information into the **Phone** field. Enter a valid value e.g. "**2195551212**".
34.	Click the **Save** object. Save
35.	Click the **OK** button. OK
36.	Scroll to the bottom of the page.
37.	Click the **Return to Enrollment Dependent/Beneficiary Summary** link. Return to Enrollment Dependent/Beneficiary Summary
38.	Scroll to the bottom of the page.
39.	Click the **Return to Event Selection** link. Return to Event Selection
40.	Click the **Enroll** option for the dependent you have added.
41.	Click in the **Specify a Primary Care Provider ID** field.
42.	Enter the Primary Care Physician's ID Number into the field. Enter a valid value, e.g. "**47606**".
43.	Click the checkbox if you have previously seen the provider.
44.	**Decision:** Please make a selection from the options listed below. • Use the Same Provider for All Dependents • Select Different Providers for Your Dependents (Optional)
45.	**Use the Same Provider for All Dependents** Click the checkbox if all of your dependents use the same provider.
46.	Click the **Continue** button. Continue
47.	Scroll to the bottom of the page.
48.	Click the **OK** button. OK

49.	**Select Different Providers for Your Dependents (Optional)** Click the **Dependent Provider List** link. Dependent Provider List
50.	Enter the desired information into the **Health Provider ID** field. Enter a valid value e.g. "**6512345**".
51.	Click the **Previously Seen** option.
52.	Enter the desired information into the **Health Provider ID** field. Enter a valid value e.g. "**6512345**".
53.	Click the **Previously Seen** option.
54.	Enter the desired information into the **Health Provider ID** field. Enter a valid value e.g. "**6512345**".
55.	Click the **Previously Seen** option.
56.	Click the **OK** button. OK Go to step 46 on page 8
57.	Congratulations, you have completed the Health portion of the Enrollment Transaction! Please proceed to the Dental election. **End of Procedure.** Remaining steps apply to other paths.

Enroll in the HSA (Health Savings Account)

1.	Click the **Edit** button. Edit
2.	To enroll in the HSA, you must complete and sign the Tower Bank form and submit it to your Agency Benefits Coordinator. Click the **Health Savings Account** link to complete the HSA application. Health Savings Account 1
3.	Click the **OK** button. OK
4.	Access the application form from the Tower Bank website. When finished, click the **Close** button. Click the **Close** button.
5.	Click the **Return to Enrollment** link. Return to Enrollment

6.	**Decision:** Please make a selection from the options listed below. • Use the HSA Annual Pledge Worksheet (Optional) • Enter Annual Pledge
7.	**Use the HSA Annual Pledge Worksheet (Optional)** Click the **Worksheet** link. Worksheet
8.	Enter the desired information into the field. Enter a valid value e.g. "**50.00**".
9.	Click the **Calculate** button. Calculate
10.	Click the **Return** link. The annual pledge from the worksheet will display in the pledge field on the next page. Return
11.	**Enter Annual Pledge** Click the option.
12.	Enter the desired information into the **Annual Pledge** field. Enter a valid value e.g. "**1000.00**".
13.	Release the mouse button.
14.	Click the **Continue** button. Continue
15.	Click the **OK** button. OK
16.	**End of Procedure.** Remaining steps apply to other paths.

Enroll in a Dental Plan

1.	Click the **Edit** button next to Dental. Edit
2.	**Decision:** Please make a selection from the options listed below. • View Plan Descriptions • Select a Dental Plan
3.	Scroll to view the dental plan choices.
4.	**View Plan Descriptions** Click the **Plan Descriptions** link. Plan Descriptions
5.	Click the **OK** button. OK

6.	Click the **Maximize/Restore** button.
7.	Click the **Close** button.
8.	Click the **Return to Enrollment** link. Return to Enrollment
9.	Click the radio button to select the desired plan option.
10.	Scroll to view the rest of the page.
11.	Review the dependents listed. Only dependents marked with the check in the Enroll checkbox will be enrolled in the Dental Plan.
12.	Click the **Enroll** option if necessary to enroll dependents in the list who are not checked. Remember: if you have selected the DMO plan, you will need to specify a Location ID for your dentist in the Provider id field. Employees who enroll in a Traditional plan are not required to specify a Location ID. Employees may search for a provider by clicking the Select a Provider link. The procedures for using this link are the same for the Dental Benefit as the Health Benefit. Please refer to the Enroll in a Health Plan section for more information on selecting a provider.
13.	Click the **Continue** button. Continue
14.	Scroll to view the rest of the page.
15.	Click the **OK** button. OK
16.	Congratulations, you have completed the Dental portion of the Enrollment Transaction! Please proceed to the Vision election. **End of Procedure.** Remaining steps apply to other paths.

Enroll in a Vision Plan

1.	Click the **Edit** button. Edit
2.	Click the radio button for the plan you would like to select.
3.	Scroll to view the remainder of the page.
4.	Review the dependents listed. Dependents are enrolled when the checkbox next to their name contains a checkmark.
5.	Click the **Enroll** option if necessary to enroll dependents in the list who are not checked.

6.	Click the **Continue** button. Continue
7.	Scroll to view the remainder of the page.
8.	Click the **OK** button. OK
9.	Congratulations! You have completed the Vision portion of the Enrollment Transaction. Please proceed to the Medical Spending election. **End of Procedure.**

Enroll in the Medical Spending Account

1.	Scroll to view the rest of the page.
2.	Click the **Edit** button next to Medical Spending Account. Edit
3.	Click the desired option.
4.	Enter the desired information into the **Annual Pledge** field. Example: enter
5.	**Decision:** Please make a selection from the options listed below. • Use the Pledge Worksheet (Optional) • Continue the Enrollment Transaction
6.	**Use the Pledge Worksheet (Optional)** Click the **Worksheet** hyperlink. Worksheet
7.	Highlight the value in the field.
8.	Enter the desired bi-weekly contribution into the field. Enter a valid value, e.g. "**24.00**".
9.	Click the **Calculate** button. Calculate
10.	Click the **Return** link. Return
11.	**Continue the Enrollment Transaction** Click the **Continue** button. Notice the Annual Pledge calculated by the worksheet now appears in the Annual Pledge field. Continue
12.	Click the **OK** button. OK
13.	Congratulations, you have completed the Medical Spending Account portion of the Enrollment Transaction! Please proceed to the Dependent Spending Account election. **End of Procedure.** Remaining steps apply to other paths.

Enroll in the Dependent Spending Account

1.	Scroll to view the rest of the page.
2.	Click the **Edit** button. Edit
3.	Click the option.
4.	Enter the desired information into the **Annual Pledge** field. Enter a valid value e.g. "**5000.00**".
5.	**Decision:** Please make a selection from the options listed below. • Use the Annual Pledge Worksheet (Optional) • Continue with the Transaction
6.	**Use the Annual Pledge Worksheet (Optional)** Click the **Worksheet** link. Worksheet
7.	Click in the field. 0.00
8.	Highlight the value in the field.
9.	Press **[Delete]**.
10.	Enter the desired bi-weekly contribution into the field. Enter a valid value, e.g. "**50.00**".
11.	Click the **Calculate** button. Calculate
12.	Click the **Return** link. Return
13.	**Continue with the Transaction** Scroll to view the remainder of the page. Notice the annual pledge calculated by using the worksheet appears in the Annual Pledge field.
14.	Click the **Continue** button. Continue
15.	Click the **OK** button. OK
16.	Congratulations, you have completed the Dependent Spending Account portion of the Enrollment Transaction! Please proceed to the Tax Saver for Life AD and D election. **End of Procedure.** Remaining steps apply to other paths.

Enroll in Life AD and D (Basic Life Insurance)

1.	Click the **Edit** button. Edit
2.	Click the **Basic Life TaxSaver ($28,500)** link. Basic Life TaxSaver ($57,000)
3.	Click the **OK** button. OK
4.	Click the **Close** button.
5.	Click the **Return to Enrollment** link. Return to Enrollment
6.	Scroll to the bottom of the page.
7.	Review the Primary and Secondary beneficiary allocations. Edit the allocations as desired. If necessary use the Add/Review Beneficiaries button to add or edit beneficiary data.
8.	Click the **Continue** button. Continue
9.	Click the **OK** button. OK
10.	Congratulations, you have successfully enrolled for Basic Life Insurance. Continue to the Supplemental Life Insurance section of the manual. **End of Procedure.**

Enroll in Supplemental Life

1.	Click the **Edit** button. Edit
2.	Scroll the object with the mouse wheel.
3.	Click the option.
4.	Release the mouse button.
5.	Click the **Continue** button. Continue
6.	Click the **OK** button. Alexander
7.	**End of Procedure.**

Enroll in Dependent Life

1.	Click the **Edit** button. Edit
2.	Select the desired level of coverage.
3.	Scroll to the bottom of the page.
4.	Use the check boxes next to each dependent's name to enroll them in the plan. Click the **Continue** button when finished. Continue
5.	Click the **OK** button. OK
6.	**End of Procedure.**

Submitting Your Elections

1.	Scroll to the bottom of the page.
2.	Click the **Submit** button. Submit
3.	To accept the non-tobacco user agreement, click the I Accept radio button. If you choose to decline the agreement, click the button next to I Decline. A comment box is provided.
4.	Click the **Submit** button. Submit
5.	Scroll to the bottom of the page.
6.	Click the **Submit** button. Submit
7.	Click the **OK** button. OK
8.	**End of Procedure.**

Printing Your AS47

1.	Click the **AS47** button. AS47
2.	Click the **Maximize/Restore** button.

3.	Click the **Refresh** button. Refresh
4.	Click the **blue AS47 - Payroll Change Auth** link. AS47 - Payroll Change Auth.
5.	Click the File menu, then select Print. Click OK. File
6.	Click the **Close** button.
7.	Click the Close button.
8.	**End of Procedure.**

Printing Your Event/Enrollment Summary

1.	Click the **Current Event Enrollment Summary** link. Current Event Enrollment Summary
2.	Click the **File** menu. File
3.	Click the **Print...** menu. Print... Ctrl+P
4.	Click the **Print** button. Print
5.	Click the **Sign out** link. Sign out
6.	Congratulations! You have printed the Event/Enrollment Summary. Don't forget to submit an AS47 form to your Benefits Coordinator if your new elections result in a change to your current payroll deductions. Again, check with your Agency Benefits Coordinator for more information on the AS47. Benefits for all employees will be effective on January 1, 2007. Deductions will begin: Payroll A: December 27, 2006 Payroll B: December 20, 2006 (Deductions will be for 8 days of your 2006 elections and 6 days of your 2007 elections). Deductions for flexible spending accounts (FSAs) will begin on the check dated January 10, 2007 for employees on Payroll A and January 3, 2007 for employees on Payroll B. **End of Procedure.**